

Financial Disclosure Report (FDR) Instructions

1. Go to <https://webapps.sanantonio.gov/fdr/>

OFFICE OF THE CITY CLERK
FINANCIAL DISCLOSURE REPORTING SYSTEM

FDR Options:
Logoff

The City of San Antonio's Financial Disclosure Reporting (FDR) web based application contains information required to be disclosed by the City's Ethics Code.

The following help options are available.

Email
ethics@sanantonio.gov

Business Support - Office of the City Clerk
Monday thru Friday 7:45AM - 4:30PM
(General office number) 210-207-7253
Rosalinda Diaz 210-207-7021
Carri Wiggins 210-207-3397

LOGON USING:

COSA network logon credentials.
 SAP employee number.
 Assigned logon id. (non city employees)

Logon ID:
888888

Password:
.....

Login

2. Board members must select "Assigned Logon ID" Option
3. Enter assigned logon in "Logon ID:"
4. Enter pass1 in "Password:"
5. Select
6. On the Change Password screen

Change Password.

Current Password:
(First time users: use password sent in email)

New Password:

Retype New Password:

Change Password

- a. Enter Current Password: pass1
- b. Enter a new password (enter a five characters or more)
- c. Retype the new password you have chosen
- d. Select

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7. You will see the following page if password was successfully changed



8. Press  to access your form



9. Click on  to access form

10. The following screen will appear:



Select Official 2011

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11. The Financial Disclosure Report form will appear:

City of San Antonio

Financial Disclosure Report

For use of this Form, see Section 2-74 of the City Code of Ethics Code. Please fill this Form out online and submit it for processing. **Do not leave any block blank.** If nothing to disclose, enter **NA or N/A**. Click on **ADD/SAVE** button to save data. Use the **Attachments** link in the left window to attach additional documentation if needed.

Type of Report
 Initial Annual

Period of Report: From January 1, 2010 To December 31, 2010

The reporting period should read: **From January 1, 2010 To December 31, 2010**

12. The name of the board / boards should auto-populate

Status of Reporting Party	
<input type="checkbox"/> City Official	Official Title:
<input checked="" type="checkbox"/> Board/Commission	Board/Commission Name: Ethics Review Board

13. The board member name will auto-populate. If a spelling correction needs to be made, it can be done after the report is finalized with an amendment.

(A) The reporting party's name:

Last Name	First Name	Middle Name	Suffix
Hock	Holly		

14. Type in the answer, select the **ADD/SAVE** button. The answer moves below the window as shown below. Follow the same instructions for multiple entries.

(B) Reporting party's employer(s):

* Reporting party's employer

ADD/SAVE

* Reporting party's employer(s) Edit Delete

Sea World EDIT DELETE

(C) The name of any business entity* (including self employment in the form of a sole proprietorship under a personal or assumed name) in which the reporting party or his or her spouse holds an economic interest**:

* Name of Business Entity * Type of Economic Interest

ADD/SAVE

No Records Found

Next

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15. At the bottom of each page select **Next** to go to the next page or click on the page number on the side menu.



16. Fill out all fields. If you have nothing to disclose type "NA" in each field.

A screenshot of a web form section. The title is "(D) The name of any business which the reporting party knows is a partner, or a parent or subsidiary business entity of a business owned by, operated by, or managed by the reporting party or his her spouse:". Below the title are two input fields: "* Name of Business Entity" and "* Type of Economic Interest", with an "ADD/SAVE" button to the right. Below these is a table with columns: "* Name of Business Entity", "* Type of Economic", "Edit", and "Delete". The table contains one row with "NA" in the first two columns and "EDIT" and "DELETE" buttons in the last two. Below the table is another section titled "(E) The name of any person or business entity from whom the reporting party or his or her spouse directly or indirectly:". It includes two sub-questions: "(1) Has received and not rejected an unsolicited offer of subsequent employment, or" and "(2) Has accepted an offer of subsequent employment which is binding or expected by the parties to be carried out:". Below these are two input fields: "* From whom offered" and "* By whom received", with an "ADD/SAVE" button to the right.

17. Your Legal Residence goes in (O):

A screenshot of a web form section. The title is "(O) Legal Residence: By street address, or legal or lot-and-block description, of all real property* used by reporting party as a legal residence located in the State of Texas in which the reporting party or his or her spouse has a leasehold interest, a contractual right to purchase, or an interest as: Fee Simple Owner; Beneficial Owner; Partnership Owner; Joint Owner with an individual or corporation; or owner of more than twenty-five (25) percent of a corporation that has title to real property." Below the title is a note: "*There is no requirement to list any property:". Below the note are three numbered items: "(1) Used as a personal residence of a peace officer;", "(2) Over which the reporting party has no decision power concerning acquisition or sale;", and "(3) Held through a real estate investment trust, mutual fund, or similar entity, unless the reporting party or his or her spouse participates in the management thereof;". Below these are two input fields: "* Identification by street address, or legal or lot-and-block description" and "* Type Interest/Right/Ownership", with an "ADD/SAVE" button to the right.

18. On the last page is the message regarding Public Disclosure Information. You must make a selection for Consent for Release of Public Information (yes or no) for each of the following:

- Home Address
- Home Telephone Number
- Family Information
- Select the box indicating you have read the statement

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FDR Options:

- Home
- Logoff
- Page 1
- Page 2
- Page 3
- Page 4
- **Finalize**
- Attachments

Public Disclosure of Information

The Texas Public Information Act provides that each government official may choose whether to allow the public access to the information in the custody of the City that contains your home address, home telephone number, or reveals whether you have family members. Please note that this does not apply to business addresses, which are subject of public disclosure. If an open records request is filed requesting to view or obtain records that contain your personal information, the City will take steps to protect your personal information as authorized by the Texas Public Information Act, but only if you have elected to protect personal information.

I want the public to have access to my: (Please Indicate)

Home Address Yes No

Home Telephone Number Yes No

Family Information Yes No

*** Consent for Release of Public Information**

I understand that if any member of the public makes a request for information included in this Application for Appointment, most of the informatin must be disclosed under the Public Information Act. I understand that the City of San Antonio will attempt to maintain the confidentiality of highly private matters. In accordance with the information, and I hereby release the City of San Antonio, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act or any other law requiring its release.

19. Oath

- Select box indicating you have read the statement
- Type in your name
- The date auto-populates

*** Oath**

By clicking this box, I swear or affirm that the statements contained in this Financial Disclosure Report (including any accompanying supplements) to the best of my knowledge and belief are, true, correct, and complete.

Name **Date**

20. You must click on **Finalize Report** for the report to be submitted.

21. If report was completed correctly, you will receive the following message:

Report Submitted Successfully

OFFICE OF THE CITY CLERK
FINANCIAL DISCLOSURE REPORTING SYSTEM

FDR Options:

- Home
- Logoff

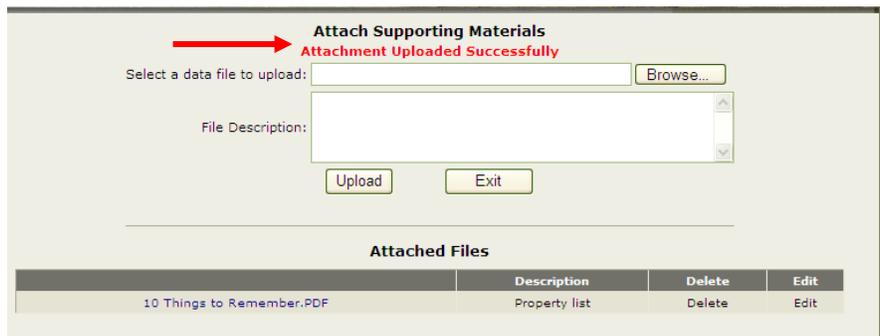
Report has been submitted Successfully.

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22. If you need to add an attachment:
 a. Select attachment on the side menu

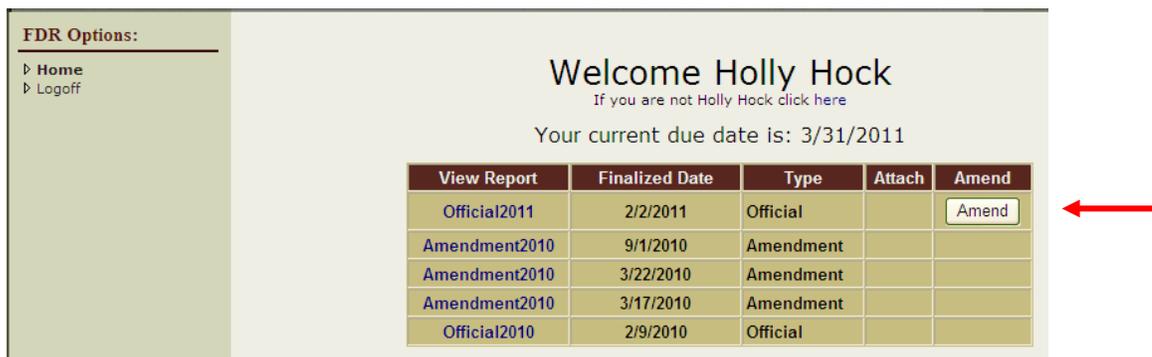


- b. to select your file, type a description and click .
- c. You should get a message stating "Attachment Uploaded Successfully"



Note: A file that is open cannot be uploaded.

23. If you wish to make an amendment once the report has been finalized under FDR Options: select Home and then Amend next to the Official2011



Note: Amendments are allowed up until the due date only.

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24. To view your previous years FDR, on the Home screen click on Official2010



25. If you get an error message that reads:

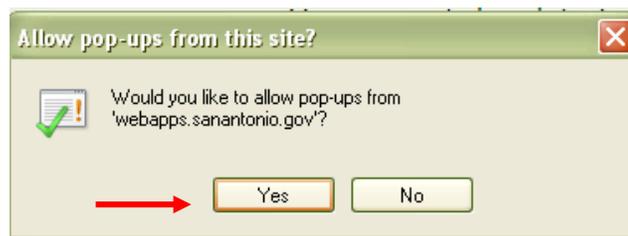
a. Pop-up blocked. To see this pop-up or ...



b. Click on the bar with the message, and then select "Always Allow Pop-ups" from the drop down menu.



c. You will be asked to confirm that you want to allow pop-ups, select yes



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26. When the form opens, you may get this error message and a blank form:

Data from this site is blocked to avoid potential security risks. If you trust this document, add the host "cosaweb" to Privileged Locations (in Enhanced Security preferences) to receive data.

A screenshot of a web browser displaying a security warning at the top: "Data from this site is blocked to avoid potential security risks. If you trust this document, add the host 'cosaweb' to Privileged Locations (in Enhanced Security preferences) to receive data." Below the warning is the "City of San Antonio Financial Disclosure Report" form. The form header includes the city seal, "City of San Antonio", "Office of the City Clerk", and "Date: 01/31/2011". A "Print Form" button is in the top right. The form contains sections for "Type of Report" (Initial/Annual), "Period of Report" (From January 1, To December 31), "Status of Reporting Party" (City Official, Board/Commission, City Employee), and "The reporting party's name" table.

a. Select *Options*, then *Add host to Privileged Locations*

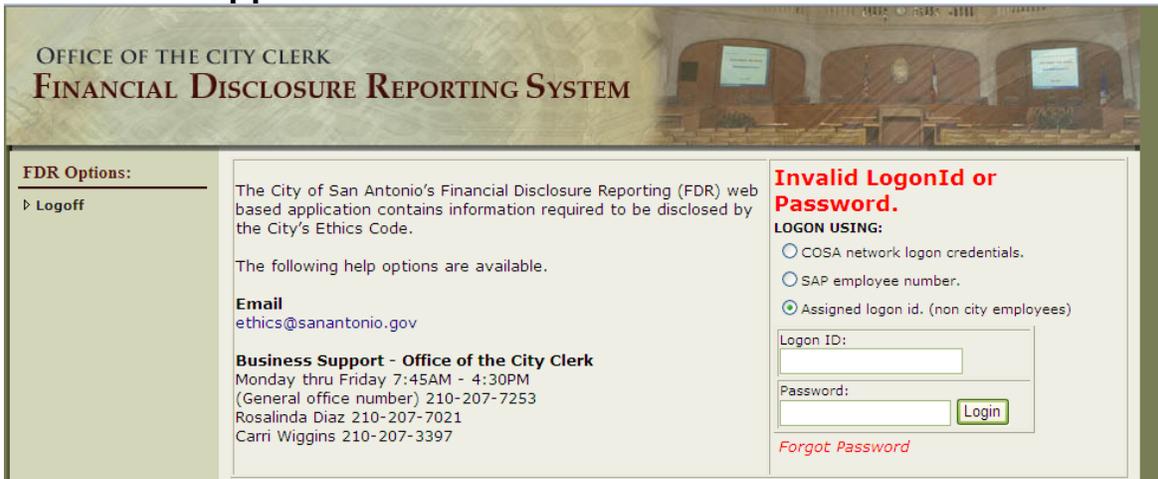
A close-up screenshot of the browser's "Options" menu. The menu is open, and the option "Add host to Privileged Locations" is highlighted in blue. The security warning from the previous screenshot is visible at the top of the browser window.

b. The form with a reporting period of January 1, 2009 to December 31, 2009 will now appear.

A screenshot of the completed "City of San Antonio Financial Disclosure Report" form. The "Type of Report" is "Annual" (checked). The "Period of Report" is "From January 1, 2009 To December 31, 2009". Under "Status of Reporting Party", "Board/Commission" is selected with "Ethics Review Board" entered. The "The reporting party's name" table is filled with "Hock" as the last name and "Holly" as the first name. Below the table, a note states: "Each initial or annual Financial Disclosure Report discloses the following information: (B) Reporting party's employer(s): HEB Grocery".

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27. If a board member has forgotten their password and puts in an invalid one this screen will appear:



a. Select "Forgot Password" user is prompted for UserID:



b. An email will be sent to the email in the system with a new password.

28. Please note: There are known issues with Firefox. Please use Explorer or Safari to complete/view FDR reports."